VERSION 1.0

Date 12.20.2014

USING WINDOWS OF VIENNA ADVANTAGE

A USER'S GUIDE

VIENNA ADVANTAGE

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Version 2015

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1 INTRODUCTION

1.1 WHAT'S IN THIS MANUAL

This Document intends to inform the user about using windows in VIENNA Advantage. Before using window, you need to login in to VIENNA Advantage.

For details of login please refer document 'Login in VIENNA Advantage'.

1.2 WHAT IS WINDOW

Window is a systematic presentation of columns of a table. Windows consists of tabs. Every tab has a single table behind it and each column of the table is represented as field on window. A window may have multiple numbers of tabs.

1.3 AUDIENCE

	Audience and Market
1	End Users
2	
3	
4	
5	

1.4 SYMBOLS AND CONVENTIONS

	Example
	Note
	Caution
	Recommendation
Tenant (Client)	Tenant is a terminology used to define a subset of data related to one or more organizations in a system. It is not a business entity but the name of a group which could relate to one or multiple business entities.

1.5 PRODUCT SUPPORT

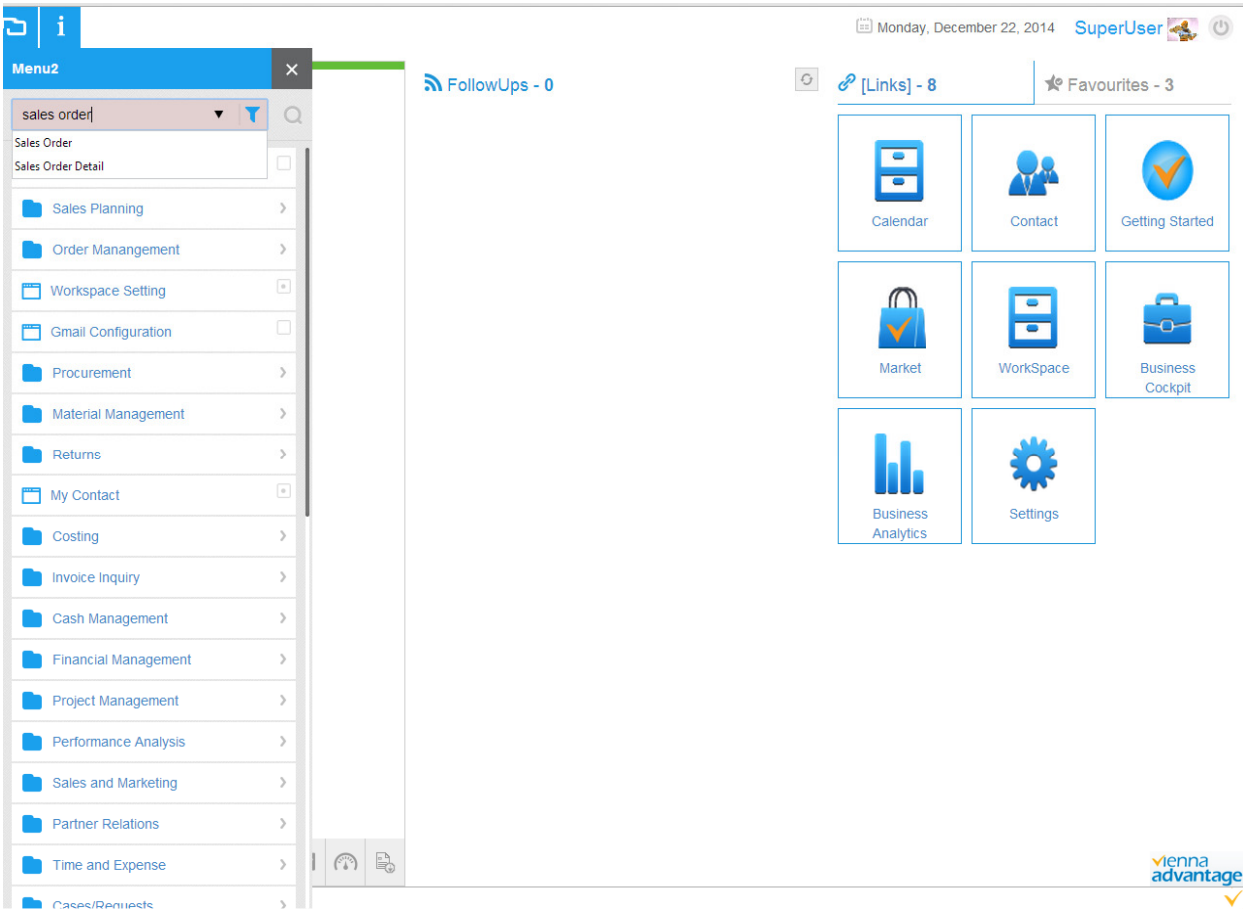
In case of any questions related to this user manual you can contact VIENNA Advantage customer care located in the "Contact" section of http://www.viennaadvantage.com

2 HOW TO OPEN WINDOW

2.1 OPEN WINDOW

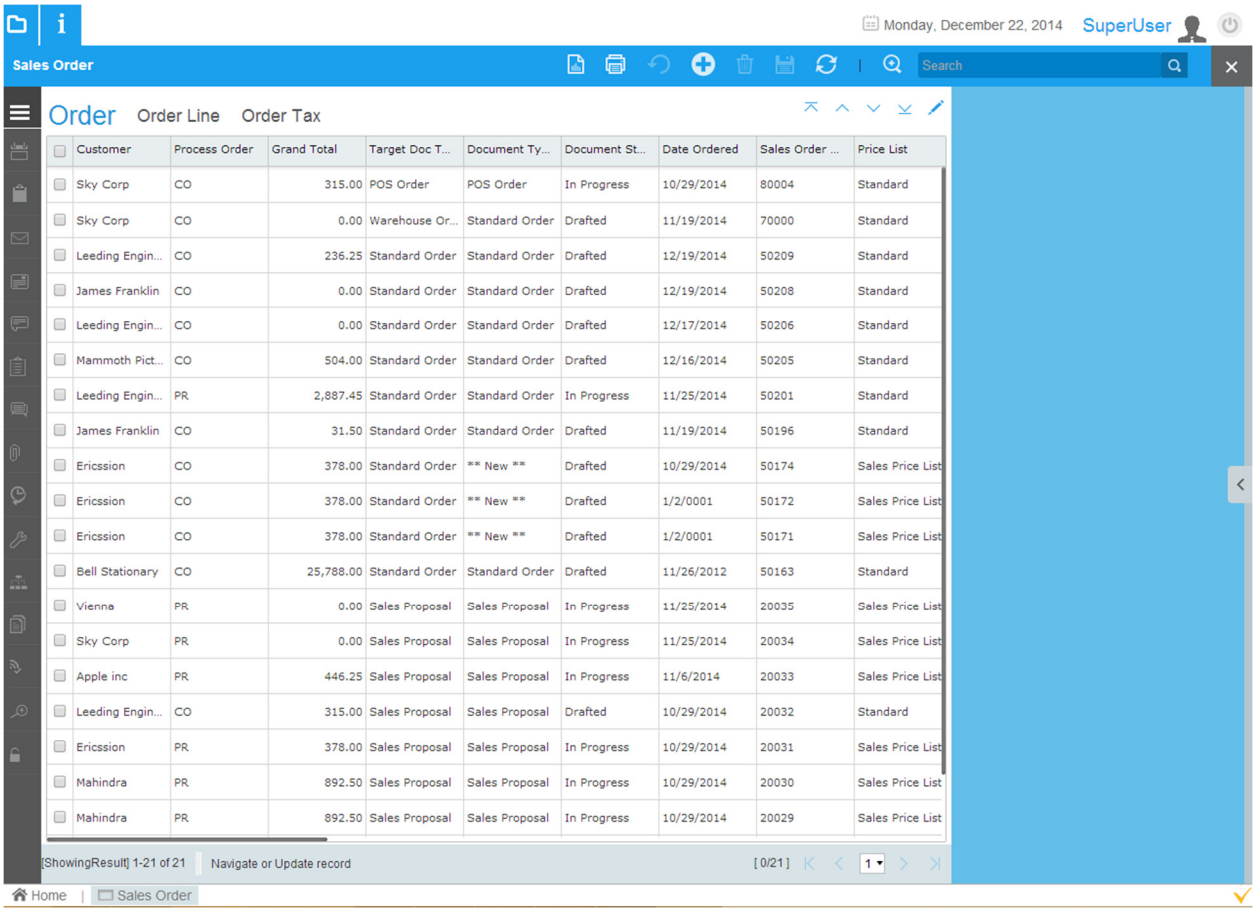
VIENNA Advantage runs as a browser based application. All browsers that support JavaScript and HTML5 can be used to run VIENNA Advantage. In case JavaScript is not enabled in your browser, read the help of your browser to enable JavaScript in your browser before running VIENNA Advantage.

Type name of window you want to open



The VIENNA Advantage home screen is shown in the above image. You just have to type the name of the window which you want to open i.e. if you want to open sales order window, type the name in the space shown in the picture.

2.2 TABS IN WINDOW

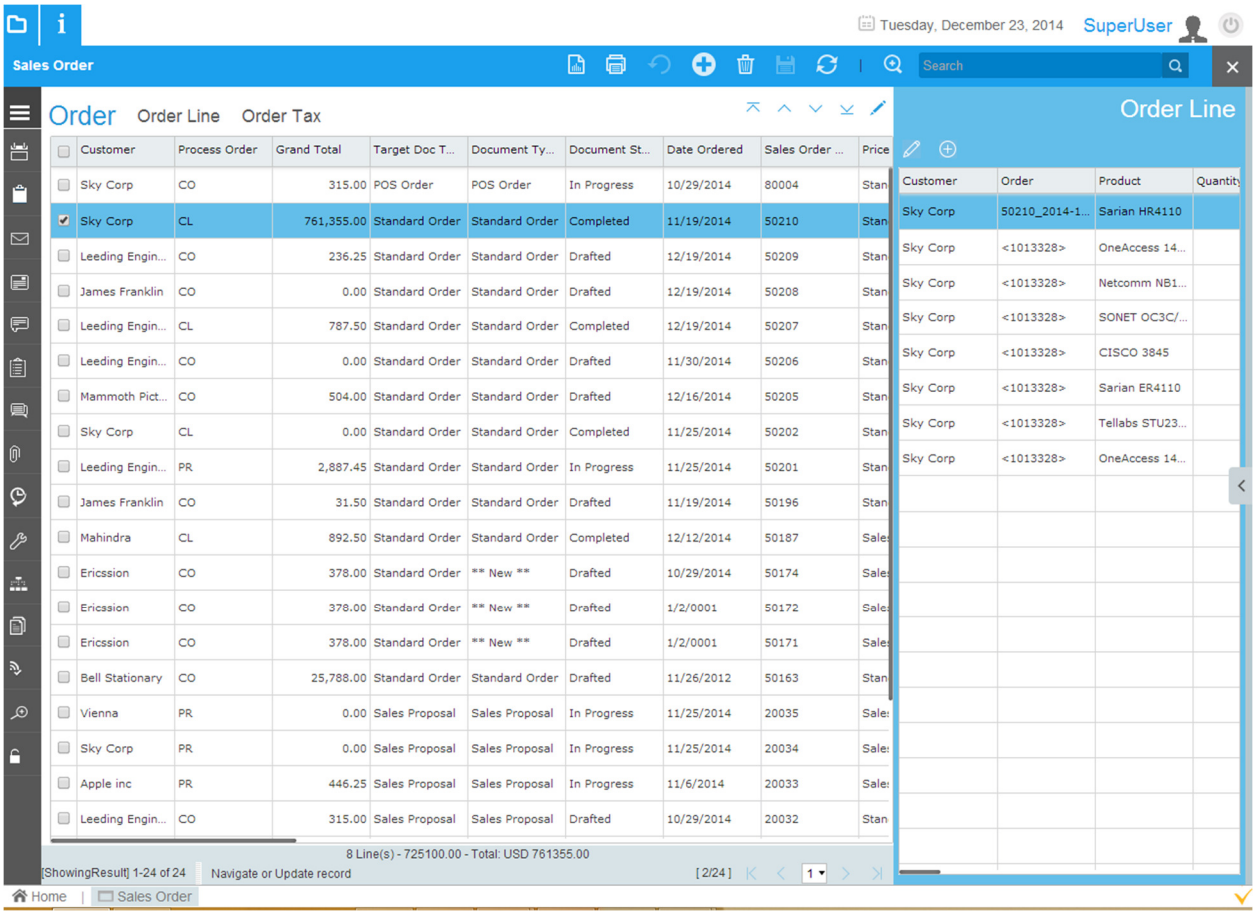

Monday, December 22, 2014
SuperUser
Sales Order
Search
Order
Order Line
Order Tax
Customer | Process Order | Grand Total | Target Doc T... | Document Ty... | Document St... | Date Ordered | Sales Order ... | Price List
Sky Corp | CO | 315.00 | POS Order | POS Order | In Progress | 10/29/2014 | 80004 | Standard
Sky Corp | CO | 0.00 | Warehouse Or... | Standard Order | Drafted | 11/19/2014 | 70000 | Standard
Leeding Engin... | CO | 236.25 | Standard Order | Standard Order | Drafted | 12/19/2014 | 50209 | Standard
James Franklin | CO | 0.00 | Standard Order | Standard Order | Drafted | 12/19/2014 | 50208 | Standard
Leeding Engin... | CO | 0.00 | Standard Order | Standard Order | Drafted | 12/17/2014 | 50206 | Standard
Mammoth Pict... | CO | 504.00 | Standard Order | Standard Order | Drafted | 12/16/2014 | 50205 | Standard
Leeding Engin... | PR | 2,887.45 | Standard Order | Standard Order | In Progress | 11/25/2014 | 50201 | Standard
James Franklin | CO | 31.50 | Standard Order | Standard Order | Drafted | 11/19/2014 | 50196 | Standard
Ericssion | CO | 378.00 | Standard Order | ** New ** | Drafted | 10/29/2014 | 50174 | Sales Price List
Ericssion | CO | 378.00 | Standard Order | ** New ** | Drafted | 1/2/0001 | 50172 | Sales Price List
Ericssion | CO | 378.00 | Standard Order | ** New ** | Drafted | 1/2/0001 | 50171 | Sales Price List
Bell Stationary | CO | 25,788.00 | Standard Order | Standard Order | Drafted | 11/26/2012 | 50163 | Standard
Vienna | PR | 0.00 | Sales Proposal | Sales Proposal | In Progress | 11/25/2014 | 20035 | Sales Price List
Sky Corp | PR | 0.00 | Sales Proposal | Sales Proposal | In Progress | 11/25/2014 | 20034 | Sales Price List
Apple inc | PR | 446.25 | Sales Proposal | Sales Proposal | In Progress | 11/6/2014 | 20033 | Sales Price List
Leeding Engin... | CO | 315.00 | Sales Proposal | Sales Proposal | Drafted | 10/29/2014 | 20032 | Standard
Ericssion | PR | 378.00 | Sales Proposal | Sales Proposal | In Progress | 10/29/2014 | 20031 | Sales Price List
Mahindra | PR | 892.50 | Sales Proposal | Sales Proposal | In Progress | 10/29/2014 | 20030 | Sales Price List
Mahindra | PR | 892.50 | Sales Proposal | Sales Proposal | In Progress | 10/29/2014 | 20029 | Sales Price List
[ShowingResult] 1-21 of 21
Navigate or Update record
[0/21]
Home
Sales Order

When you will select the window from the dropdown (Menu2), the window will open and will look like as shown in the picture above. In this window there are three tabs.

1. Order (1st Tab)
2. Order Line (2nd Tab)
3. Order Tax (3rd Tab)

The blue color of the name of tab shows us the tab which is selected at the moment. You can navigate to different tabs by clicking on the names of the tabs.

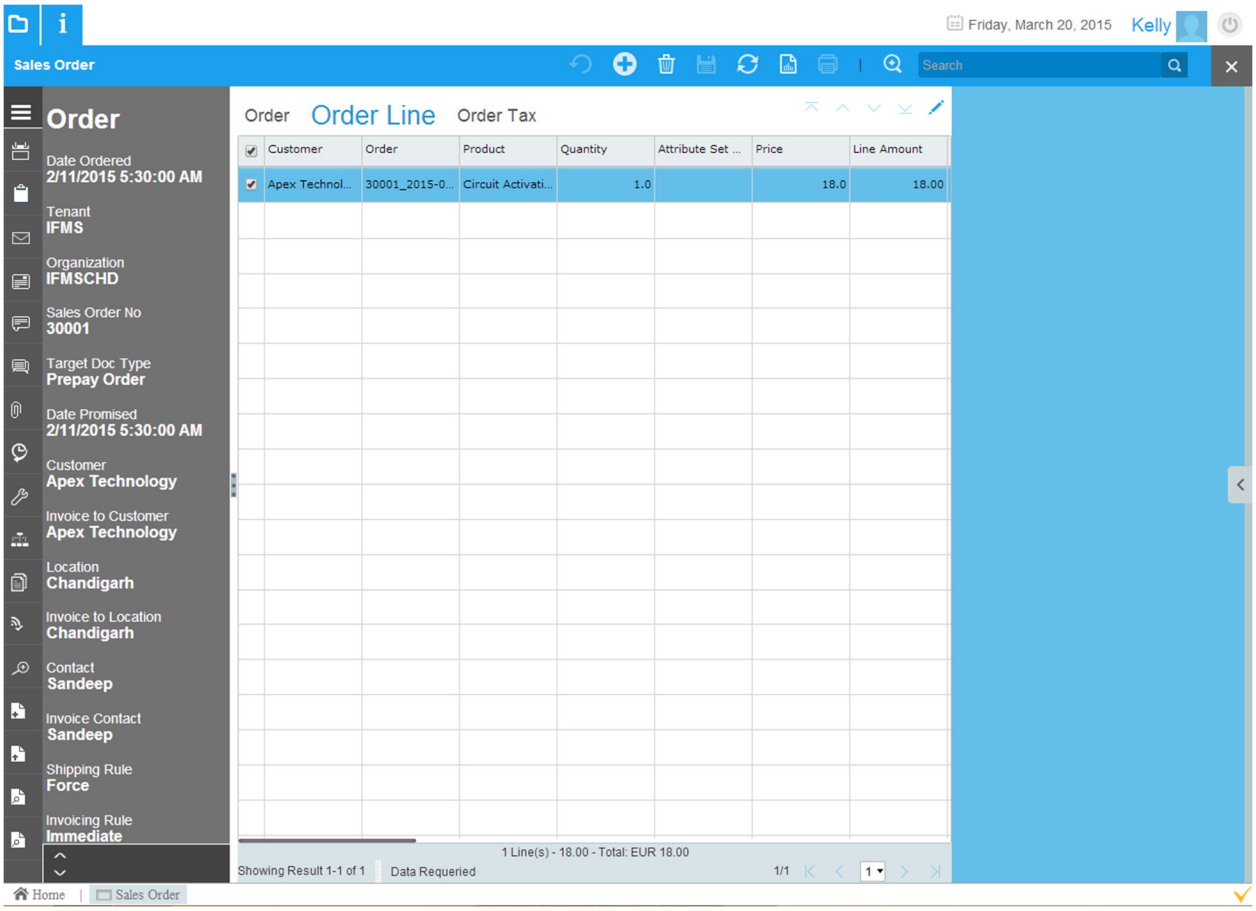
In window, there is parent child relationship between two tabs. As shown in the above image, order tab is the parent tab and order line tab is child tab of order tab. For each record on order tab there can be multiple records on order line tab.


Tuesday, December 23, 2014
SuperUser
Sales Order
Search
Order
Order Line
Order Tax
Order Line
Customer | Process Order | Grand Total | Target Doc T... | Document Ty... | Document St... | Date Ordered | Sales Order ... | Price
Sky Corp | CO | 315.00 | POS Order | POS Order | In Progress | 10/29/2014 | 80004
Sky Corp | CL | 761,355.00 | Standard Order | Standard Order | Completed | 11/19/2014 | 50210
Leeding Engin... | CO | 236.25 | Standard Order | Standard Order | Drafted | 12/19/2014 | 50209
James Franklin | CO | 0.00 | Standard Order | Standard Order | Drafted | 12/19/2014 | 50208
Leeding Engin... | CL | 787.50 | Standard Order | Standard Order | Completed | 12/19/2014 | 50207
Leeding Engin... | CO | 0.00 | Standard Order | Standard Order | Drafted | 11/30/2014 | 50206
Mammoth Pict... | CO | 504.00 | Standard Order | Standard Order | Drafted | 12/16/2014 | 50205
Sky Corp | CL | 0.00 | Standard Order | Standard Order | Completed | 11/25/2014 | 50202
Leeding Engin... | PR | 2,887.45 | Standard Order | Standard Order | In Progress | 11/25/2014 | 50201
James Franklin | CO | 31.50 | Standard Order | Standard Order | Drafted | 11/19/2014 | 50196
Mahindra | CL | 892.50 | Standard Order | Standard Order | Completed | 12/12/2014 | 50187
Ericssion | CO | 378.00 | Standard Order | ** New ** | Drafted | 10/29/2014 | 50174
Ericssion | CO | 378.00 | Standard Order | ** New ** | Drafted | 1/2/0001 | 50172
Ericssion | CO | 378.00 | Standard Order | ** New ** | Drafted | 1/2/0001 | 50171
Bell Stationary | CO | 25,788.00 | Standard Order | Standard Order | Drafted | 11/26/2012 | 50163
Vienna | PR | 0.00 | Sales Proposal | Sales Proposal | In Progress | 11/25/2014 | 20035
Sky Corp | PR | 0.00 | Sales Proposal | Sales Proposal | In Progress | 11/25/2014 | 20034
Apple inc | PR | 446.25 | Sales Proposal | Sales Proposal | In Progress | 11/6/2014 | 20033
Leeding Engin... | CO | 315.00 | Sales Proposal | Sales Proposal | Drafted | 10/29/2014 | 20032
8 Line(s) - 725100.00 - Total: USD 761355.00
[ShowingResult] 1-24 of 24
Navigate or Update record
[2/24]
Customer | Order | Product | Quantity
Sky Corp | 50210_2014-1... | Sarian HR4110
Sky Corp | <1013328> | OneAccess 14...
Sky Corp | <1013328> | Netcomm NB1...
Sky Corp | <1013328> | SONET OC3C/...
Sky Corp | <1013328> | CISCO 3845
Sky Corp | <1013328> | Sarian ER4110
Sky Corp | <1013328> | Tellabs STU23...
Sky Corp | <1013328> | OneAccess 14...
Home
Sales Order

In the above image, you can see a record is selected on order tab and there are multiple records on order line tab corresponding to the record selected on order tab. This is relation between first and second tab and similarly there will be relation between second tab and third tab and so on.

When a child record on the second tab is selected, the parent record is shown in a form of a panel on the left part on the screen. In this panel all the information of parent record is displayed in vertical panel format.

The panel on the left side of the screen which is displayed on selection of a child record on a window is shown in the image below.



As you can see in the above image when a child record is selected on Order Line tab of window, the record of header Order is displayed in the form of panel on the left side of the screen.

3 TASKBAR

On the top of the window there is a taskbar. By using the options provided on this task bar you can manipulate your existing records and can add new records in your database. This taskbar consists of following icons as shown in table below.

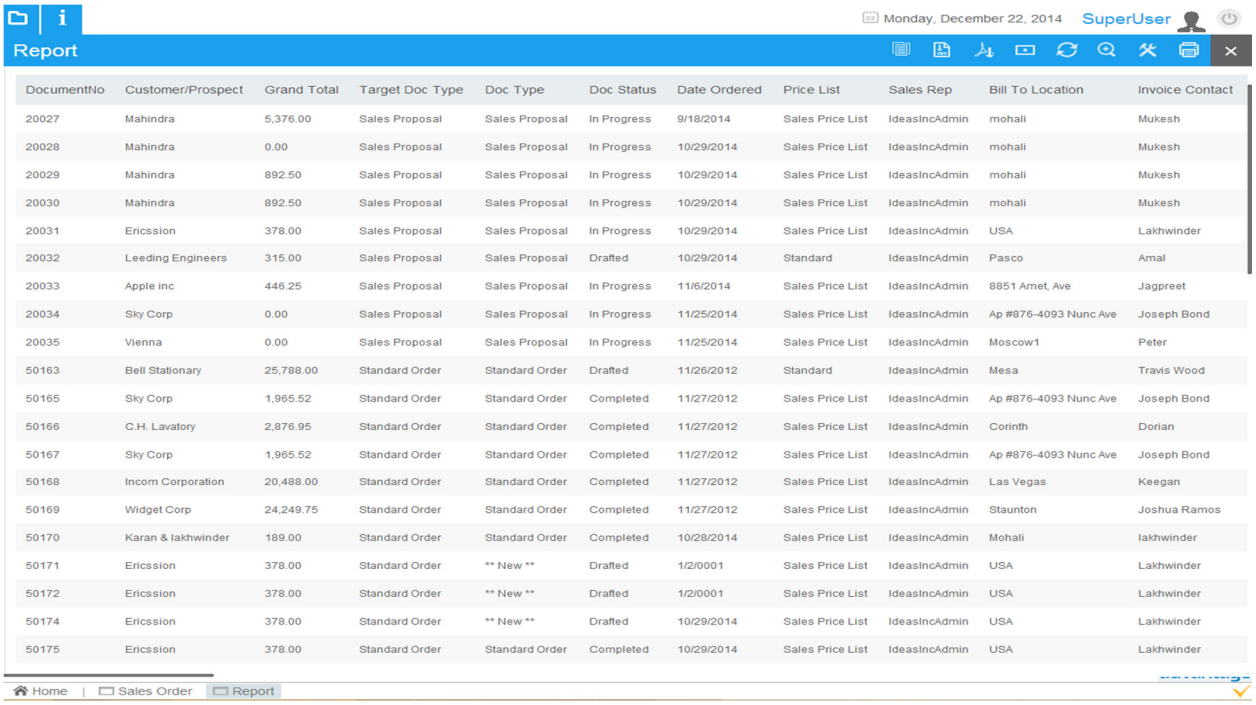
Command	Icon	Description
Report		Print a report of all records of currently opened tab.
Print		Take a print format of the selected record.
Undo Changes		If you don't want to keep the changes that you made on a certain record, then click on this icon. Note that you can undo the changes on a record before saving it in to database.
New Record		Add a new record into database.
Delete Record		Delete a saved record from database.
Save Changes		Whenever you want to save a new record or update an existing record in database, you have to press save changes icon to make entry of that record in database.
ReQuery		Refresh the records on a particular tab of a window.
Advance Search		Search records from window based on your search criteria.
Search		Search records from window directly using advance search icon located in taskbar.
Close		Close the currently active window.

3.1 REPORT

On clicking this icon all the data of the tab is displayed in a report structure. This report is same on all the windows which will fetch the data against a particular tab which is opened.

Note that this report is default functionality on each window, we cannot make any changes in report. This report automatically displays the value of all the fields that are visible on a window.

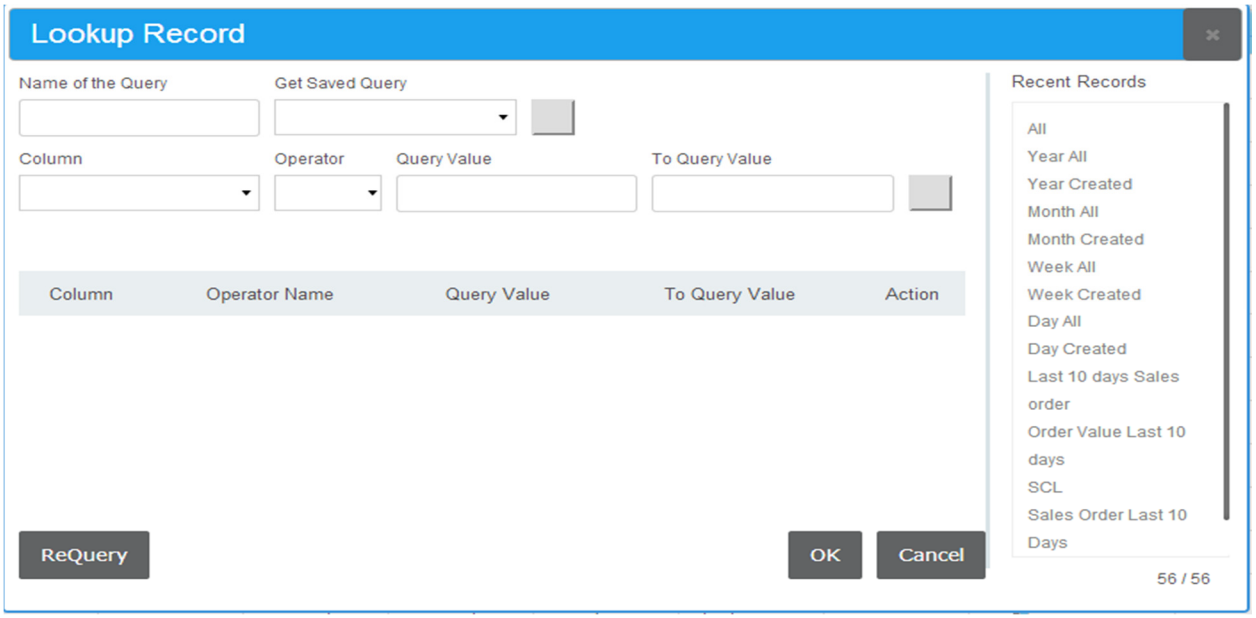
The Structure of report is shown in the picture below.



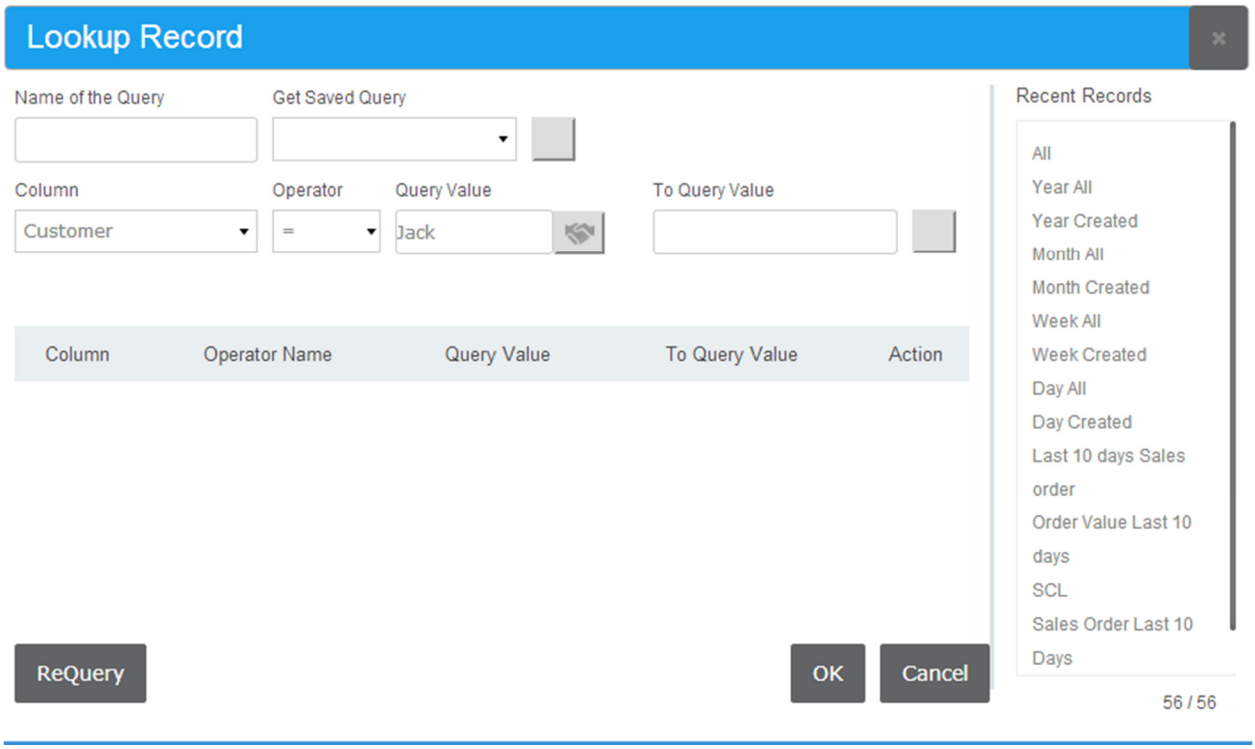
DocumentNo	Customer/Prospect	Grand Total	Target Doc Type	Doc Type	Doc Status	Date Ordered	Price List	Sales Rep	Bill To Location	Invoice Contact
20027	Mahindra	5,376.00	Sales Proposal	Sales Proposal	In Progress	9/18/2014	Sales Price List	IdeasIncAdmin	mohali	Mukesh
20028	Mahindra	0.00	Sales Proposal	Sales Proposal	In Progress	10/29/2014	Sales Price List	IdeasIncAdmin	mohali	Mukesh
20029	Mahindra	892.50	Sales Proposal	Sales Proposal	In Progress	10/29/2014	Sales Price List	IdeasIncAdmin	mohali	Mukesh
20030	Mahindra	892.50	Sales Proposal	Sales Proposal	In Progress	10/29/2014	Sales Price List	IdeasIncAdmin	mohali	Mukesh
20031	Ericssion	378.00	Sales Proposal	Sales Proposal	In Progress	10/29/2014	Sales Price List	IdeasIncAdmin	USA	Lakhwinder
20032	Leeding Engineers	315.00	Sales Proposal	Sales Proposal	Drafted	10/29/2014	Standard	IdeasIncAdmin	Pasco	Amal
20033	Apple inc	446.25	Sales Proposal	Sales Proposal	In Progress	11/6/2014	Sales Price List	IdeasIncAdmin	8851 Amet, Ave	Jagpreet
20034	Sky Corp	0.00	Sales Proposal	Sales Proposal	In Progress	11/25/2014	Sales Price List	IdeasIncAdmin	Ap #876-4093 Nunc Ave	Joseph Bond
20035	Vienna	0.00	Sales Proposal	Sales Proposal	In Progress	11/25/2014	Sales Price List	IdeasIncAdmin	Moscow1	Peter
50163	Bell Stationary	25,788.00	Standard Order	Standard Order	Drafted	11/26/2012	Standard	IdeasIncAdmin	Mesa	Travis Wood
50165	Sky Corp	1,965.52	Standard Order	Standard Order	Completed	11/27/2012	Sales Price List	IdeasIncAdmin	Ap #876-4093 Nunc Ave	Joseph Bond
50166	C.H. Lavatory	2,876.95	Standard Order	Standard Order	Completed	11/27/2012	Sales Price List	IdeasIncAdmin	Corinth	Dorian
50167	Sky Corp	1,965.52	Standard Order	Standard Order	Completed	11/27/2012	Sales Price List	IdeasIncAdmin	Ap #876-4093 Nunc Ave	Joseph Bond
50168	Incom Corporation	20,488.00	Standard Order	Standard Order	Completed	11/27/2012	Sales Price List	IdeasIncAdmin	Las Vegas	Keegan
50169	Widget Corp	24,249.75	Standard Order	Standard Order	Completed	11/27/2012	Sales Price List	IdeasIncAdmin	Staunton	Joshua Ramos
50170	Karan & lakhwinder	189.00	Standard Order	Standard Order	Completed	10/28/2014	Sales Price List	IdeasIncAdmin	Mohali	lakhwinder
50171	Ericssion	378.00	Standard Order	** New **	Drafted	1/2/0001	Sales Price List	IdeasIncAdmin	USA	Lakhwinder
50172	Ericssion	378.00	Standard Order	** New **	Drafted	1/2/0001	Sales Price List	IdeasIncAdmin	USA	Lakhwinder
50174	Ericssion	378.00	Standard Order	** New **	Drafted	10/29/2014	Sales Price List	IdeasIncAdmin	USA	Lakhwinder
50175	Ericssion	378.00	Standard Order	Standard Order	Completed	10/29/2014	Sales Price List	IdeasIncAdmin	USA	Lakhwinder

3.2 ADVANCE SEARCH

You can search a record based on certain criteria by using this advance search. When you click on advance search icon, the following popup will open. You can search a record on window by selecting a criteria column, operator and query value according to your requirement.



An example of searching a record is shown in the image below.



In the example shown above, we are searching a record where the customer name is Jack. When we click the ok icon, only those records will be shown on the window where customer name is Jack.

Similarly you can choose different column and can provide different values in query value according your requirement.

In lookup records popup, you can also save the queries that you made and also you can get those saved queries for further use. You can enter the name of the query according to your convenience.

3.3 QUICK SEARCH

You can search your records directly using quick search. You can simply enter your query value according to your criteria and the records matching your criteria will be displayed on window.

You just have to enter your query value in the space provided as shown in the above image and result matching your criteria will be displayed in the window.

Note that using quick search you can search using only those query values which are of string type on the window. You cannot search using those query values which are of other types i.e. table direct, integer etc.

4 NAVIGATION

Navigation here refers that you can navigate to different records or different pages according to your requirement. Navigation comes into play only when you are having multiple records on a page or multiple pages on of a tab.

4.1 RECORD NAVIGATION

Using these icons you can navigate to different records on a single page. You are provided with the option for navigating to next record, previous record, last record or first record on a page. Icons for navigating to different records are shown in the table below.

Command	Icon	Description
First Record		You can navigate to first record of the currently active tab of a window.
Last Record		You can navigate to last record of the currently active tab of a window.
Next Record		You can navigate to the record which is immediately next to the current record.
Previous Record		You can navigate to the record which is immediately previous to the current record.

4.2 PAGE NAVIGATION

Using these icons you can navigate to different pages on a tab of a window. You are provided with the option for navigating to next page, previous page, last page or first page on a tab. Icons for navigating to different pages are shown in the table below.

Command	Icon	Description
First Page		If there are multiple pages on a tab, then you can navigate to the records which are on the first page of that tab.
Last Page		If there are multiple pages on a tab, then you can navigate to the records which are on the last page of that tab.
Page Up		If there are multiple pages on a tab, then you can navigate to the records which are on immediately previous page to the current page.
Page Down		If there are multiple pages on a tab, then you can navigate to the records which are on immediately next page to the current page.

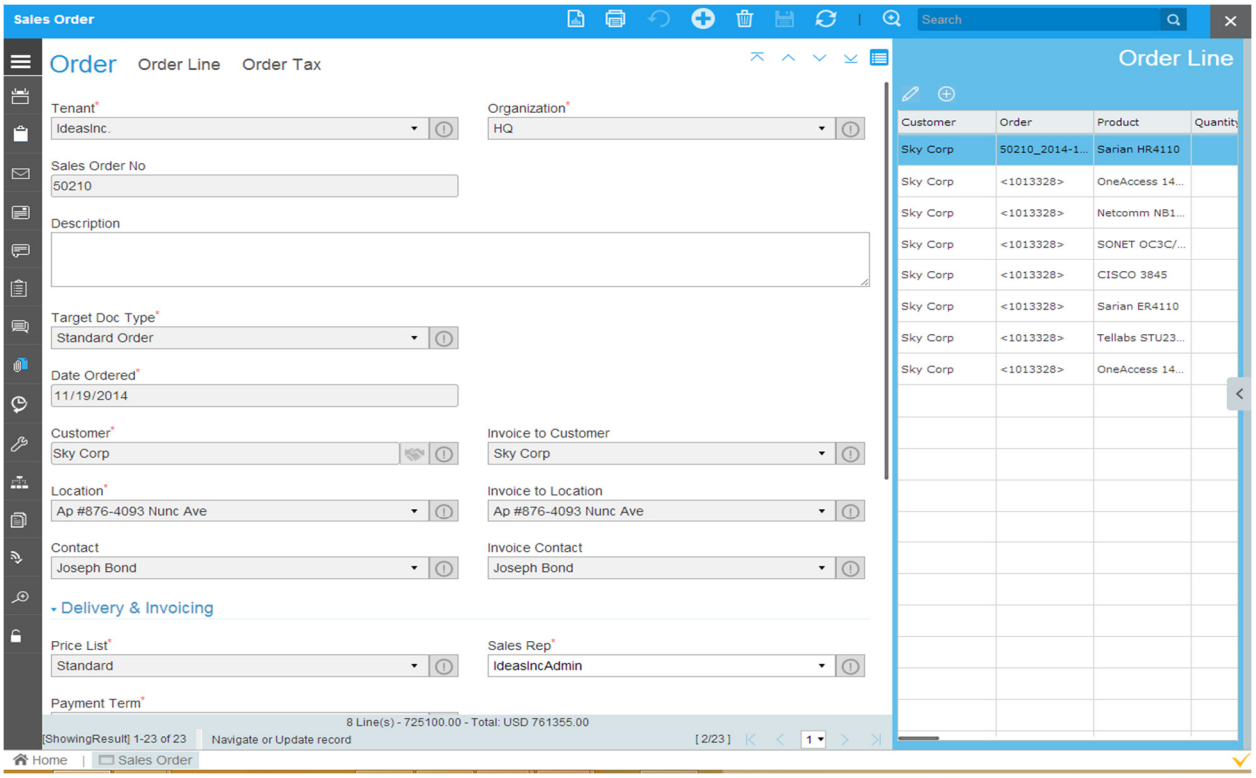
5 RECORD VIEW

VENNA Advantage provides with a feature to view records of windows in two types of layout i.e. single row layout or multi row layout. This icon is provided in the task bar and it changes accordingly when you change the view from single row layout to multi row layout or vice versa.

Command	Icon	Description
Grid Toggle		When multi row view is active on a window then by clicking this icon you can change view to Single row layout. When you add or update a record, you always use single row layout view.
Grid Toggle		When single row view is active on a window then by clicking this icon you can change view to multi row layout.

5.1 SINGLE ROW LAYOUT

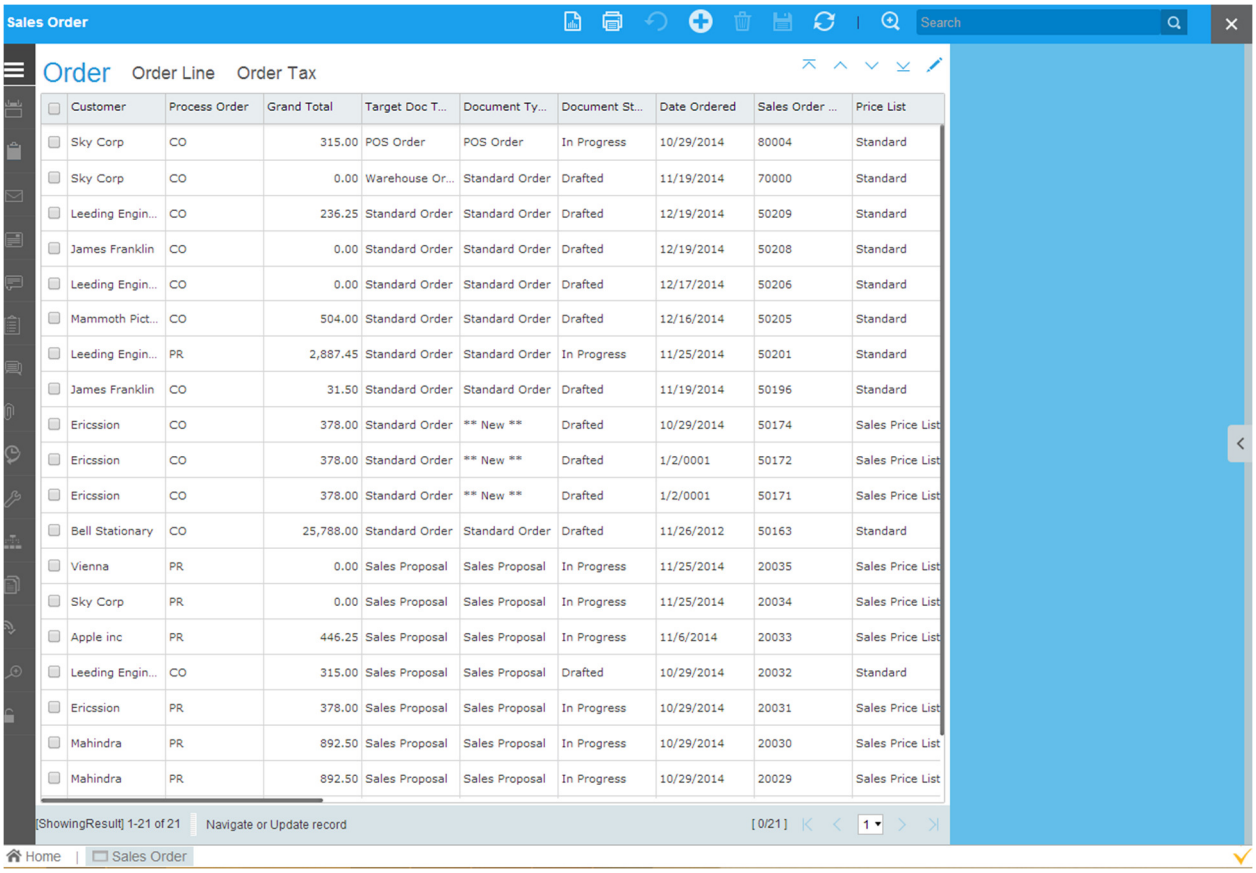
In single row layout view, you can view presentation of fields on window. For adding record or updating records this view is mainly used. In this view you can see one record at a time.



In the image shown above, you can see single row layout of a record on a window. This view shows you the presentation of each field.

5.2 MULTI ROW (GRID) LAYOUT

In multi row layout, you get a grid layout of records on window. In this view you can see multiple records at a time. Using this layout you can't edit any record. This view lets you search records in window easily.


Sales Order
Search
Order
Order Line
Order Tax
Customer | Process Order | Grand Total | Target Doc T... | Document Ty... | Document St... | Date Ordered | Sales Order ... | Price List
Sky Corp | CO | 315.00 | POS Order | POS Order | In Progress | 10/29/2014 | 80004 | Standard
Sky Corp | CO | 0.00 | Warehouse Or... | Standard Order | Drafted | 11/19/2014 | 70000 | Standard
Leeding Engin... | CO | 236.25 | Standard Order | Standard Order | Drafted | 12/19/2014 | 50209 | Standard
James Franklin | CO | 0.00 | Standard Order | Standard Order | Drafted | 12/19/2014 | 50208 | Standard
Leeding Engin... | CO | 0.00 | Standard Order | Standard Order | Drafted | 12/17/2014 | 50206 | Standard
Mammoth Pict... | CO | 504.00 | Standard Order | Standard Order | Drafted | 12/16/2014 | 50205 | Standard
Leeding Engin... | PR | 2,887.45 | Standard Order | Standard Order | In Progress | 11/25/2014 | 50201 | Standard
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Ericssion | CO | 378.00 | Standard Order | ** New ** | Drafted | 10/29/2014 | 50174 | Sales Price List
Ericssion | CO | 378.00 | Standard Order | ** New ** | Drafted | 1/2/0001 | 50172 | Sales Price List
Ericssion | CO | 378.00 | Standard Order | ** New ** | Drafted | 1/2/0001 | 50171 | Sales Price List
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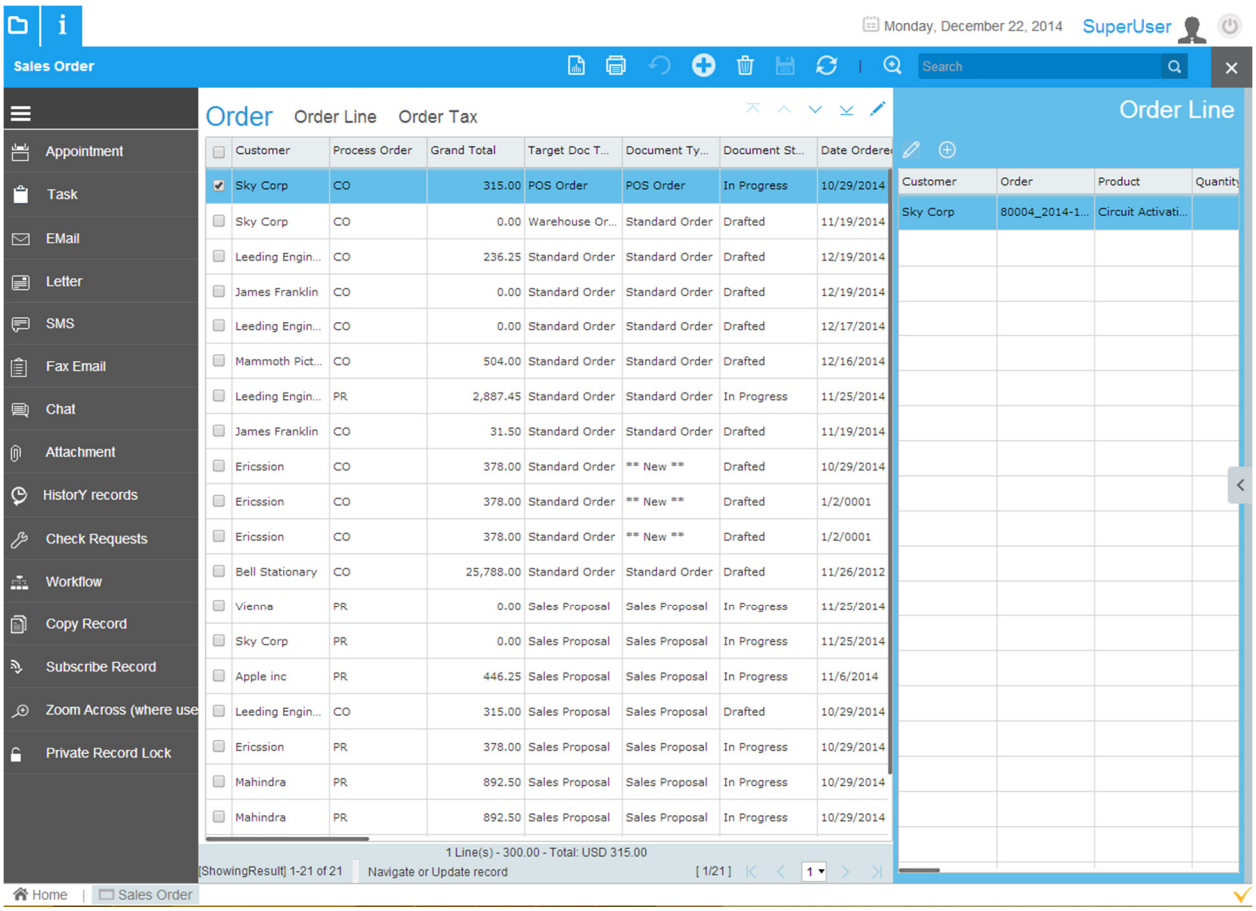
Vienna | PR | 0.00 | Sales Proposal | Sales Proposal | In Progress | 11/25/2014 | 20035 | Sales Price List
Sky Corp | PR | 0.00 | Sales Proposal | Sales Proposal | In Progress | 11/25/2014 | 20034 | Sales Price List
Apple inc | PR | 446.25 | Sales Proposal | Sales Proposal | In Progress | 11/6/2014 | 20033 | Sales Price List
Leeding Engin... | CO | 315.00 | Sales Proposal | Sales Proposal | Drafted | 10/29/2014 | 20032 | Standard
Ericssion | PR | 378.00 | Sales Proposal | Sales Proposal | In Progress | 10/29/2014 | 20031 | Sales Price List
Mahindra | PR | 892.50 | Sales Proposal | Sales Proposal | In Progress | 10/29/2014 | 20030 | Sales Price List
Mahindra | PR | 892.50 | Sales Proposal | Sales Proposal | In Progress | 10/29/2014 | 20029 | Sales Price List
[ShowingResult] 1-21 of 21
Navigate or Update record
[0/21]
Home
Sales Order

In the image shown above you can see multi row view of window.

6 LEFT PANEL

The left most part of the window is known as Left Panel which consists of various icons that are shown in the image below. With help of these icons you can perform some specific task on the existing records in the window. Various icons are shown in the image below


Monday, December 22, 2014
SuperUser
Sales Order
Search
Order
Order Line
Order Tax
Appointment
Task
EMail
Letter
SMS
Fax Email
Chat
Attachment
HistorY records
Check Requests
Workflow
Copy Record
Subscribe Record
Zoom Across (where use
Private Record Lock
Customer
Process Order
Grand Total
Target Doc T...
Document Ty...
Document St...
Date Ordere
Sky Corp CO 315.00 POS Order POS Order In Progress 10/29/2014
Sky Corp CO 0.00 Warehouse Or... Standard Order Drafted 11/19/2014
Leeding Engin... CO 236.25 Standard Order Standard Order Drafted 12/19/2014
James Franklin CO 0.00 Standard Order Standard Order Drafted 12/19/2014
Leeding Engin... CO 0.00 Standard Order Standard Order Drafted 12/17/2014
Mammoth Pict... CO 504.00 Standard Order Standard Order Drafted 12/16/2014
Leeding Engin... PR 2,887.45 Standard Order Standard Order In Progress 11/25/2014
James Franklin CO 31.50 Standard Order Standard Order Drafted 11/19/2014
Ericssion CO 378.00 Standard Order ** New ** Drafted 10/29/2014
Ericssion CO 378.00 Standard Order ** New ** Drafted 1/2/0001
Ericssion CO 378.00 Standard Order ** New ** Drafted 1/2/0001
Bell Stationary CO 25,788.00 Standard Order Standard Order Drafted 11/26/2012
Vienna PR 0.00 Sales Proposal Sales Proposal In Progress 11/25/2014
Sky Corp PR 0.00 Sales Proposal Sales Proposal In Progress 11/25/2014
Apple inc PR 446.25 Sales Proposal Sales Proposal In Progress 11/6/2014
Leeding Engin... CO 315.00 Sales Proposal Sales Proposal Drafted 10/29/2014
Ericssion PR 378.00 Sales Proposal Sales Proposal In Progress 10/29/2014
Mahindra PR 892.50 Sales Proposal Sales Proposal In Progress 10/29/2014
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1 Line(s) - 300.00 - Total: USD 315.00
[ShowingResult] 1-21 of 21
Navigate or Update record
[1/21]
Order Line
Customer
Order
Product
Quantity
Sky Corp
80004_2014-1...
Circuit Activati...
Home
Sales Order

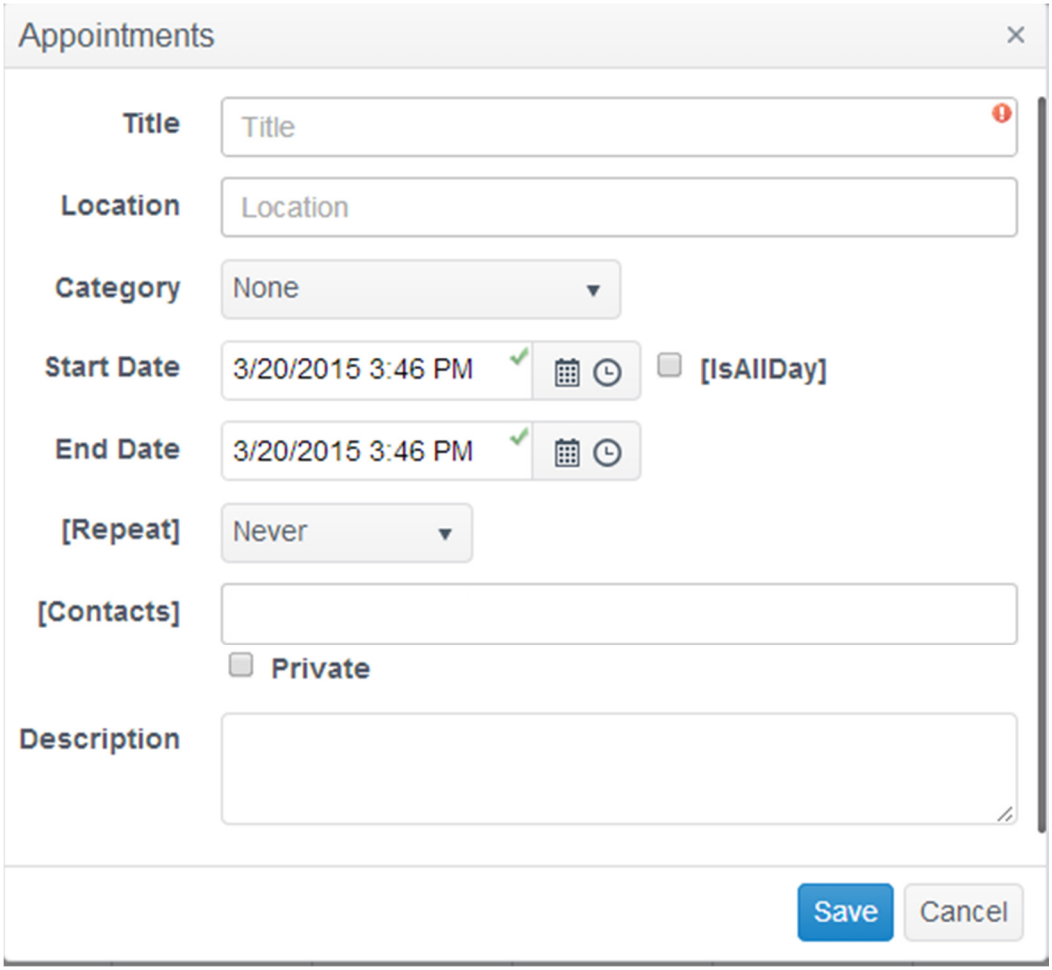
Each icon in the left panel performs a specific task on records. Description of each icon is given below.

Command	Icon	Description
Appointment		Create appointments with any other user that exists in the system.
Task		Create task for any other user that exists in the system.

Email		Send emails to users. The email address will be picked automatically by window if there exists any email address of the contacted person or you can enter the email address manually.
Letter		Create a letter and this saved letter can be used as an attachment for email.
SMS		Send messages on phone. The mobile number will be picked by window automatically if there exists any phone number of the contacted person on window or you can enter the phone number manually.
Chat		Attach a chat to a record. This chat can be a piece of information that you want to save for that particular record.
Attachment		Attach a document to a record. This attachment document can be any information related to record.
History Records		To see history records on a particular record. You can see details of appointment, task, email and letter that are linked to that particular record.
Check Requests		Create a request or a complaint to any user that exists in the system.
Workflow		To see the pending workflow activities against a particular record that is not processed yet.
Copy Record		Create replica of a particular record.
Subscribe Record		If we subscribe a record, then the chat which I attached to that particular record becomes visible under follow ups section on the home screen of VIENNA Advantage.
Zoom Across		Find all the records on different windows where a particular record is being used.
Private Record Lock		Lock a particular record and this locked record will only be visible to those users for which the personal access checkbox is checked on role window.

6.1 APPOINTMENT

Appointment is basically a meeting which can be scheduled on daily bases, weekly basis, monthly basis or yearly basis. You can create an appointment with a user. When you create an appointment with any user, a request is generated to that user and user can see this request on appointments section on home page.



The form shown in above image is appointment form which will open when you click appointment icon in left panel. Using this form you can create an appointment.

Enter the title of the appointment

You can create the title of the appointment according to your requirement.

Enter location of appointment

By entering the location you can set the location of appointment where that appointment will be going to happen.

Select category of appointment

You can set the category of appointment.

Select start date and end date

Set start date and end date of the appointment. This date section also considers time at which the appointment will be started and ended.

Select repeat criteria

Selecting repeat criteria you can set whether the appointment is to be repeated on daily basis, weekly basis, monthly basis etc.

Enter contact

Enter the name of the user here with whom you want to fix an appointment.

Check private checkbox

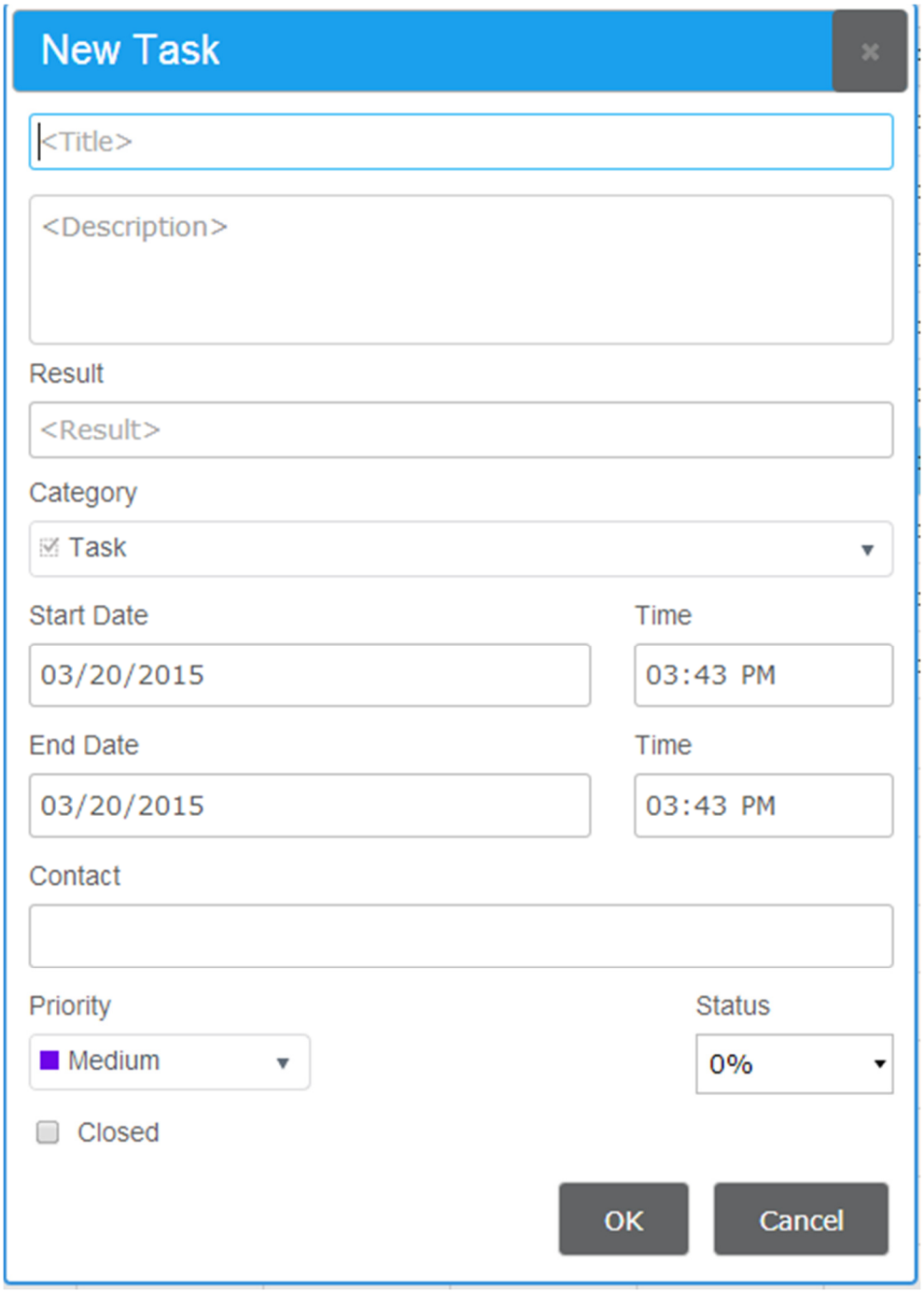
If you want that the appointment you made should be visible to only those users who are involved in that appointment, then mark the private checkbox.

Enter description

Enter description of appointment. This may include brief information of the topic about which the appointment is created.

6.2 TASK

Task refers to any work given to someone. VIENNA Advantage provides with functionality to create task for users. When a task is assigned to a user, that user can view that task in my task section on home page.



The form shown in above image is task form which will open when you click task icon in left panel. Using this form you can assign a task to users.

Enter the title of the task

You can create the title of the task according to your requirement.

Enter description

Enter description of task. This may include brief information of the topic about which the task is being created.

Enter result

You can enter the result regarding the task you assigned.

Select category of task

You can set the category of task.

Select start date and end date

Set start date and end date of the task. This date section also considers time at which the task will be started and ended.

Enter contact

Enter the name of the user here to whom you want to assign task. This task will be automatically displayed to that user's home screen in task section

Select priority

Priority refers to importance of task. You can set priority of a task. The order of assigned tasks which will be visible to user on home screen depends upon the priority of task.

Select status

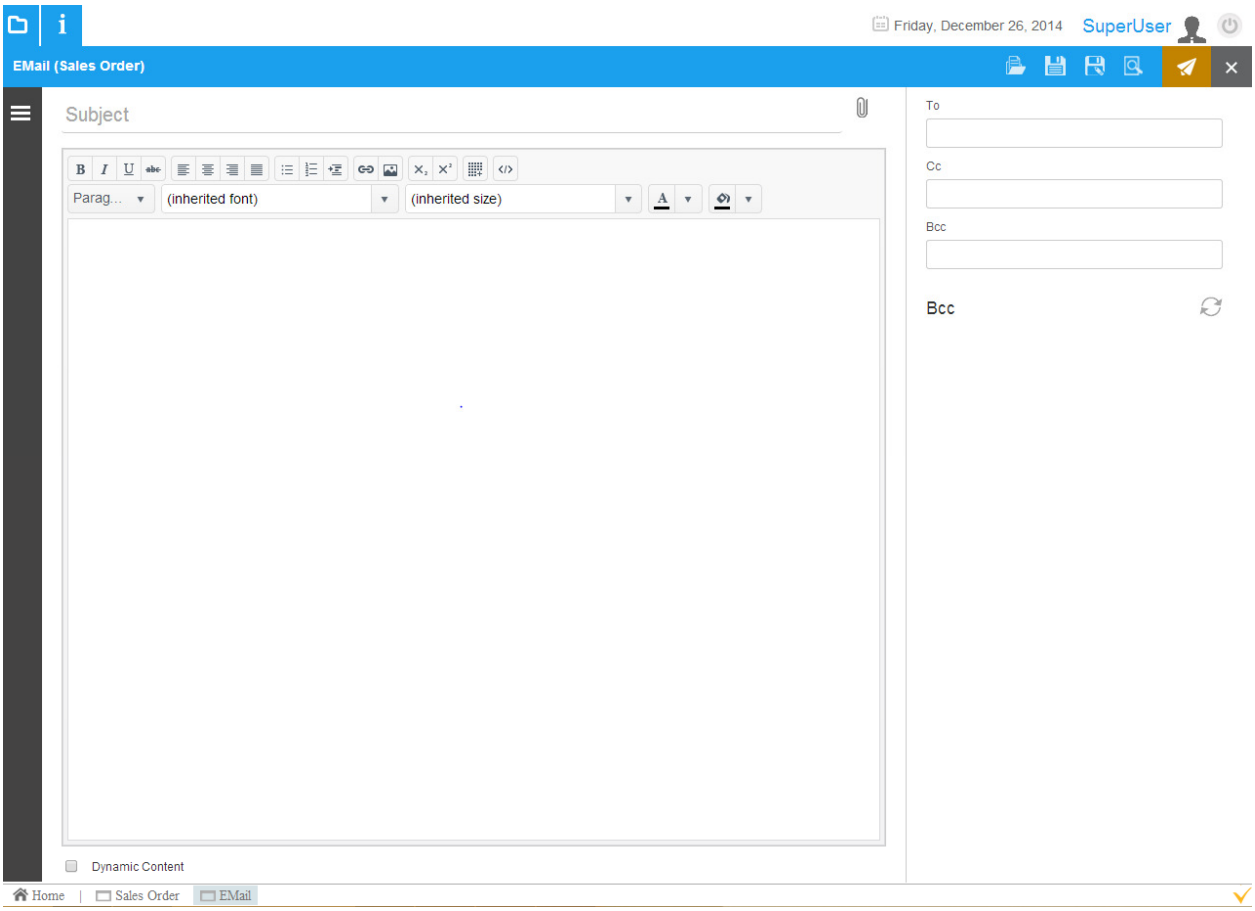
You can set the status of a task which is assigned to you.

Select closed

When a task is completed or you want to close a task in between, check the closed checkbox. This will set the status to 100% automatically.

6.3 EMAIL

VIENNA Advantage provides you functionality to send email from windows. While sending an email, the email address is automatically fetched from record from which you are sending an email or you can enter the email address manually also. You can also send dynamic content in email which fetches the details of the record automatically.



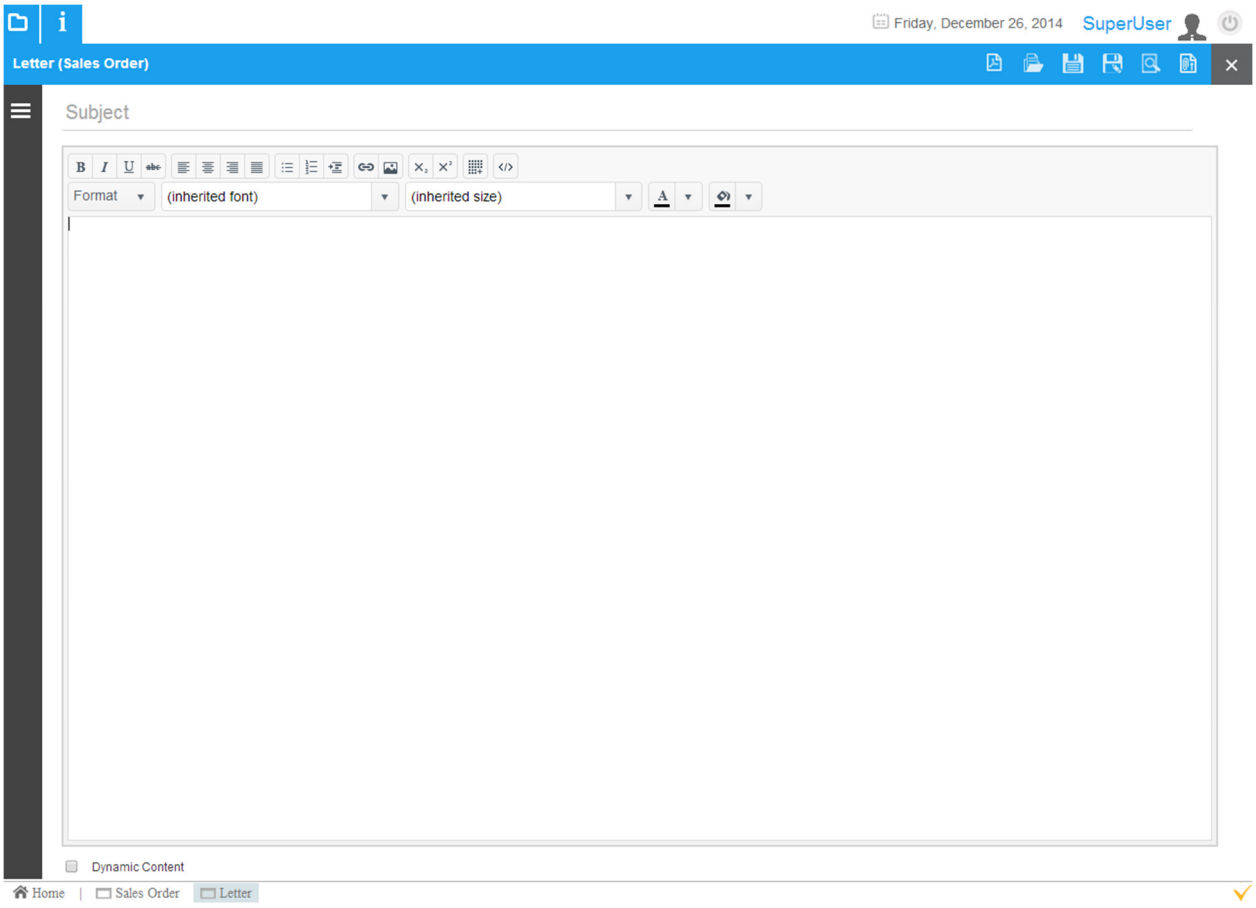
Email form is shown in the above image. You can enter subject of email, user to whom you want to send email, the content of email. You can also save the send mail templates and can fetch these templates for further use.

When you check the dynamic content checkbox, you can drop the columns of that tab in your content and these columns will automatically fetch data from that tab.

For detailed explanation of email, you can go to document ‘Using Actions at Windows - Emails’.

6.4 LETTER

You are provided with an option to create letters and these letters can be saved for future use. These saved letters can be sent as email attachment.

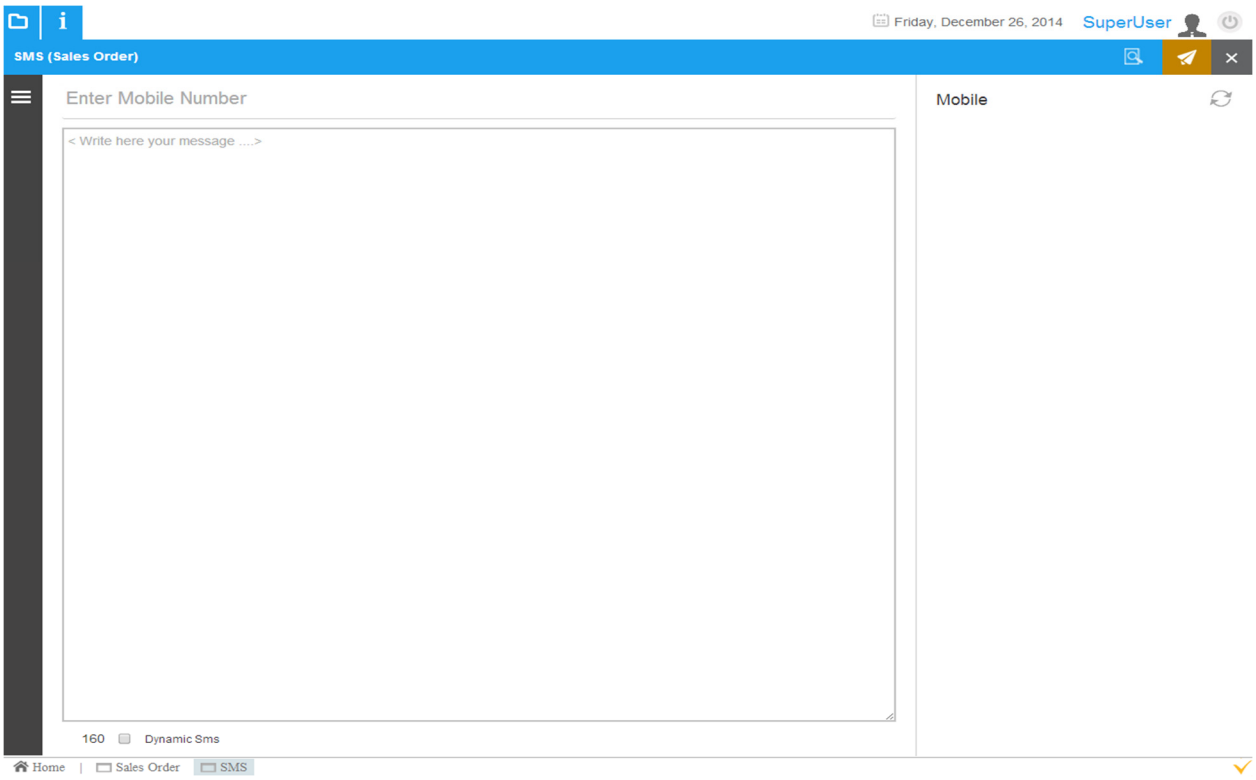


Letter form is shown in above image. You can give subject to a letter and content can be given manually or dynamically. For dynamic content you have to check dynamic content checkbox. To save letters and to pick templates there are few icons provided in taskbar at the top. It is same in case of letter and email.

For detailed explanation of letter you can go to document ‘Using Actions at Windows - Letters’.

6.5 SMS

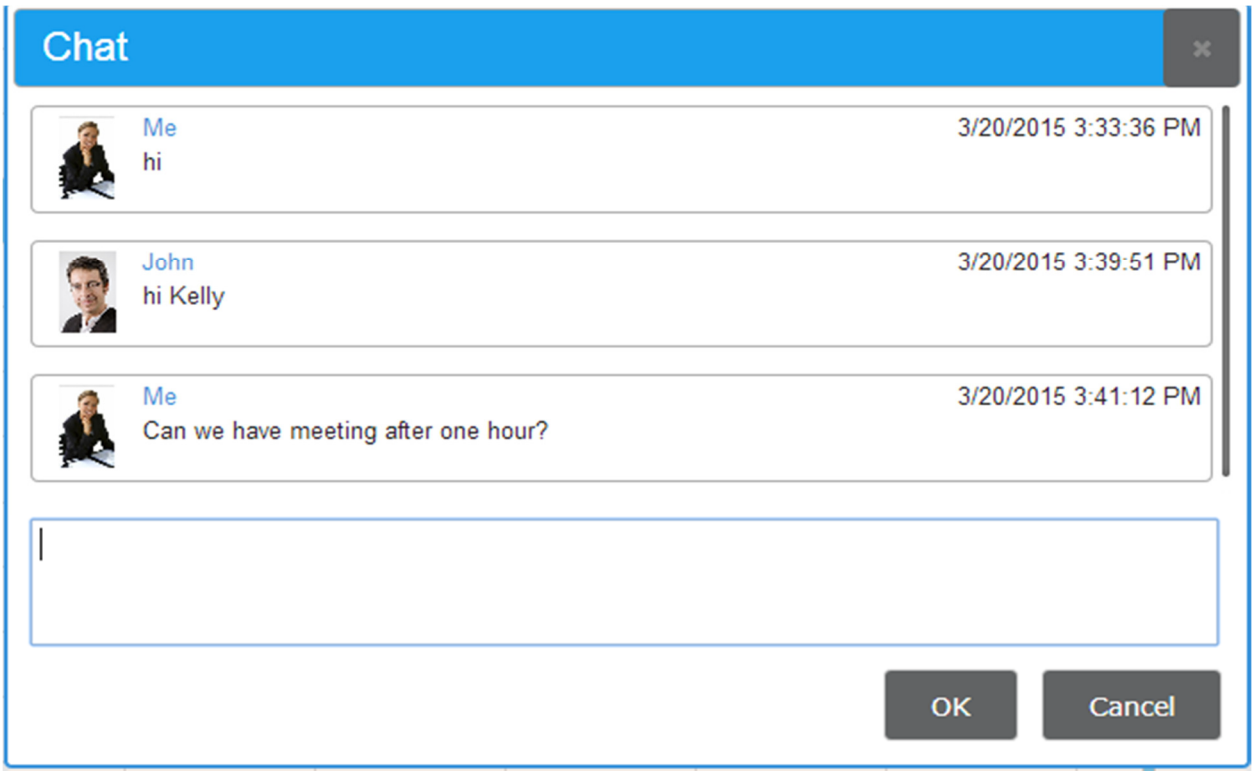
You can send SMS from windows. While sending SMS, the mobile number is automatically fetched from record from which you are sending SMS or you can enter the mobile number manually also. You can also send dynamic content in SMS which fetches the details of the record automatically.



SMS form is shown in the above image. You have to enter the mobile number manually or you can pick the mobile number from right panel shown on the SMS form. You can also select multiple numbers from right panel and can send multiple SMS at a time.

6.6 CHAT

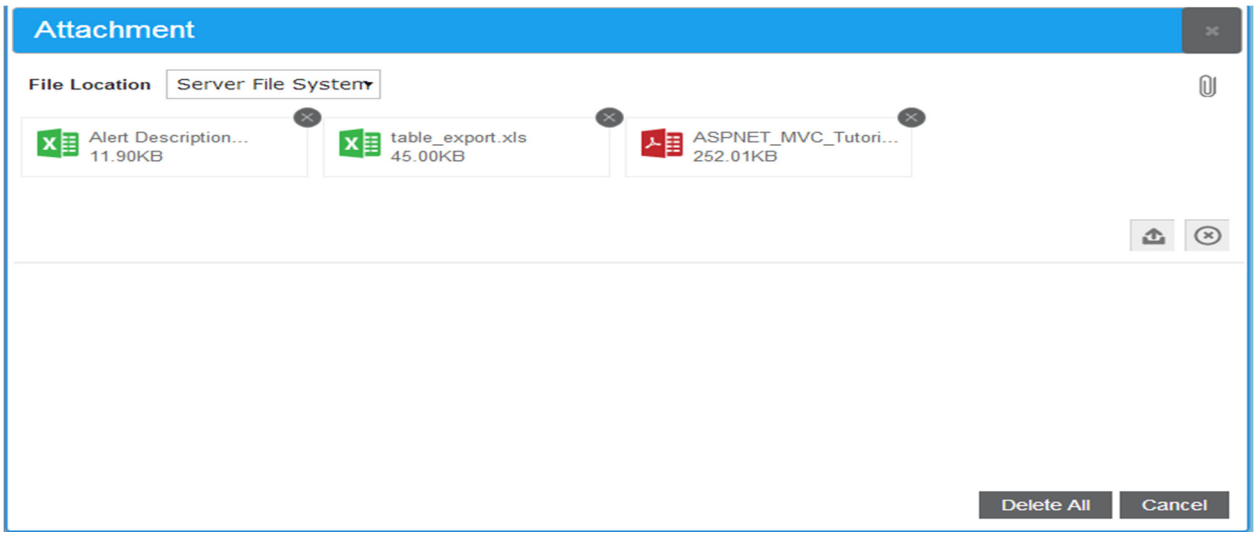
You can attach chat to record. Chat here is referred to any kind of information that you want to share for a particular record. When you attach any chat with a record, the color of chat icon changes to blue color. The blue color of chat icon indicates that there is some information attached to a particular record. Chat with this record can be made visible on home page under follow up section if that record is subscribed.



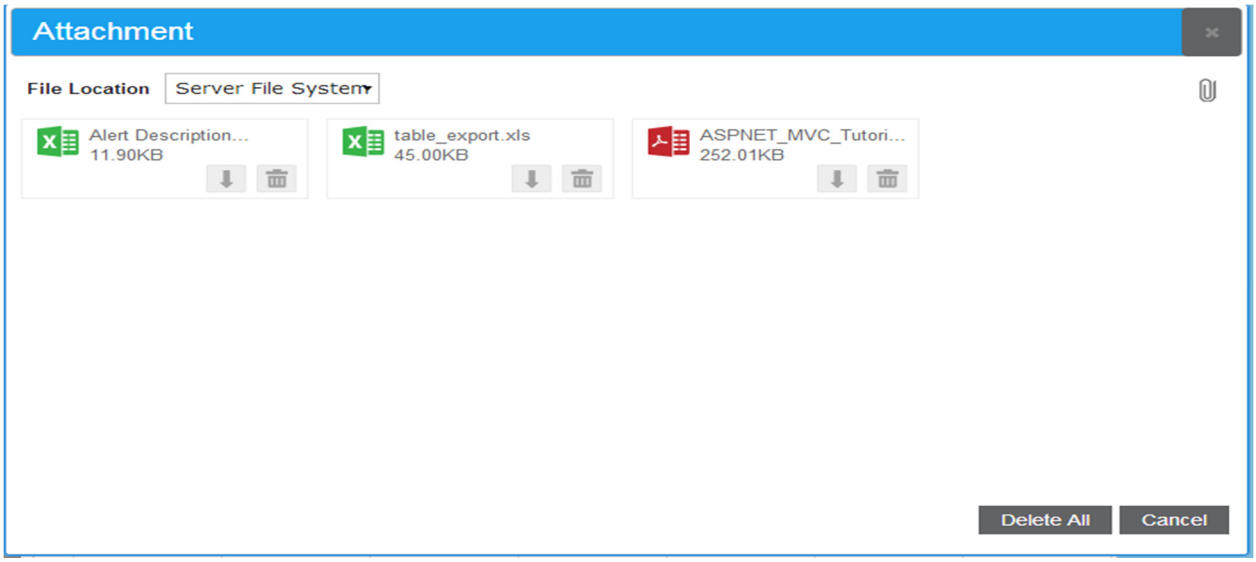
As shown in the above image is the chat form. You can enter the information in the space provided. This attached information will be visible to all users who will see this record.

6.7 ATTACHMENT

Attachment is known as an informative document which is linked to some record. VIENNA Advantage provides you with feature of attaching document to a particular record. These documents can be like Terms & Conditions Agreements for vendor/customer, Invoices etc. when a document is attached to a record, the attachment icon color changes to blue. This blue color indicates that some document is attached to record. You can also attach multiple documents with a single record.



In the above image attachment popup is shown. As you can see, there are three files selected that can be attached to particular record. You can delete these selected files by simply clicking the cross icon provided with each file. These three files are not yet attached to the record. To attach these files to a record, you have to click the upload icon shown on the attachment popup.

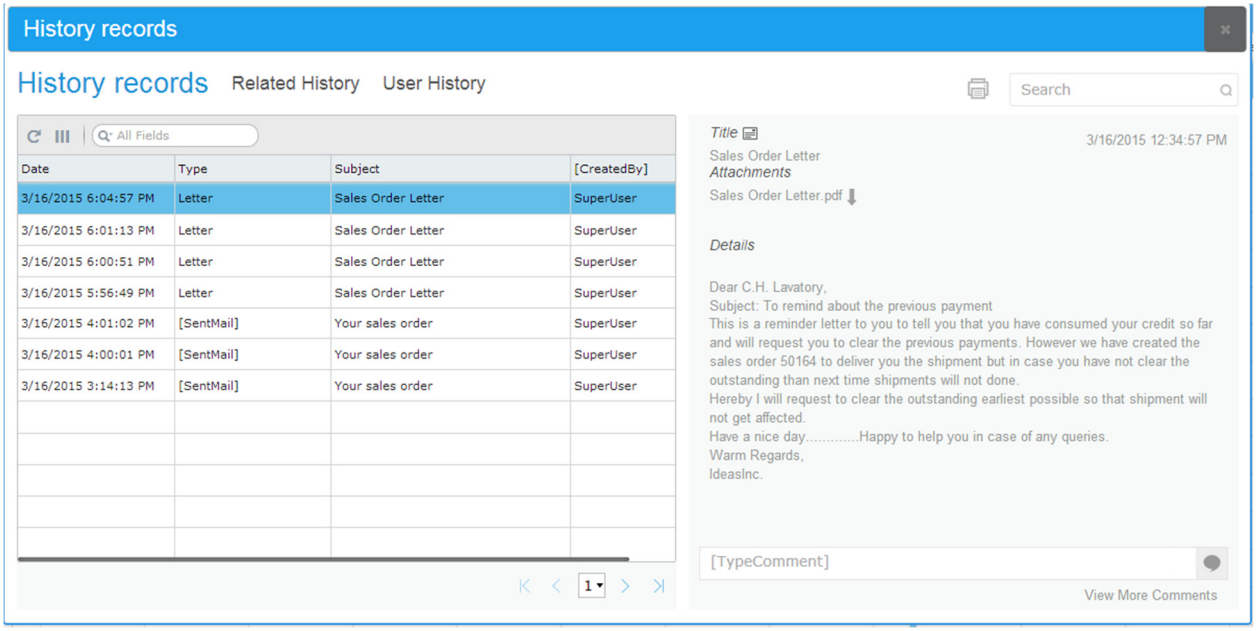


When you click the upload button, your selected files are attached to the record and files in the popup are shown as shown in the above image. You can delete the attachment by clicking the delete button shown on the attachment or you can delete all the attachment directly by clicking delete all button.

For detailed explanation of attachment you can go to document 'Attach documents to records'.

6.8 HISTORY RECORDS

History record shows the history of a particular record. History tells you about all the appointments, tasks, letters and the emails that are linked with that particular record. You can also view the details of these appointments, tasks etc.



In the above image you can see that few appointments and emails are linked with the record for which you opened history. In the right section you can see the details of each record on history form.

6.9 CHECK REQUEST

Raise request or complaints about something. When you will click this icon, you will be directed to request window for creating a request. Select a sales rep on request window and create a request, this request is automatically reflected to the user to whom the request or complaint is assigned.

6.10 WORKFLOW

It shows pending workflow activities of a document. When you complete a document on which a workflow is attached, a request is generated to the supervisor for further approval of that document.

6.11 COPY RECORD

You can create a replica of a record.

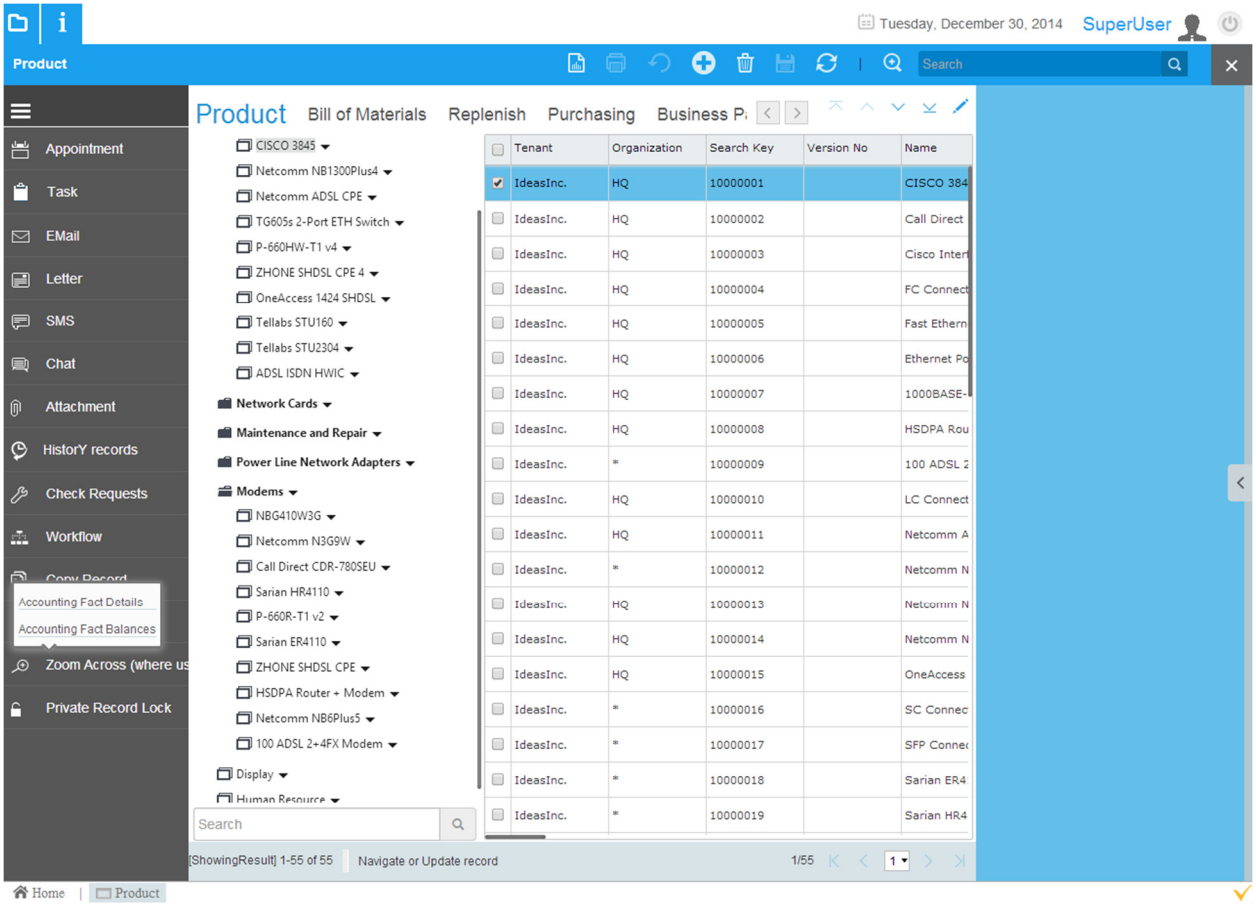
6.12 SUBSCRIBE RECORD

When any chat is linked to a record and that record is subscribed, then the linked chat becomes visible in the follow ups section on the home page. For further detailed explanation you can go to document ‘Follow Ups and Record Subscription’.

6.13 ZOOM ACROSS

With help of zoom across you can navigate to different record on different windows where that particular record is used. This shows names of all the windows in a popup where the record is used and you can click on any window from the popup to navigate to a particular window.

An example Zoom Across on a record is shown in the image below.



As shown in the above image when zoom across is clicked on a particular record, then a pop up is generated just above the zoom across icon. This popup shows the names of all the windows where this product is being used. You can click on window from pop to navigate to the record on that window where that particular selected record is used.

6.14 PRIVATE RECORD LOCK

VIENNA Advantage provides with feature of locking a record. A locked record is not visible to all the users and it will only be visible to those users for which the personal access checkbox is checked on role window.

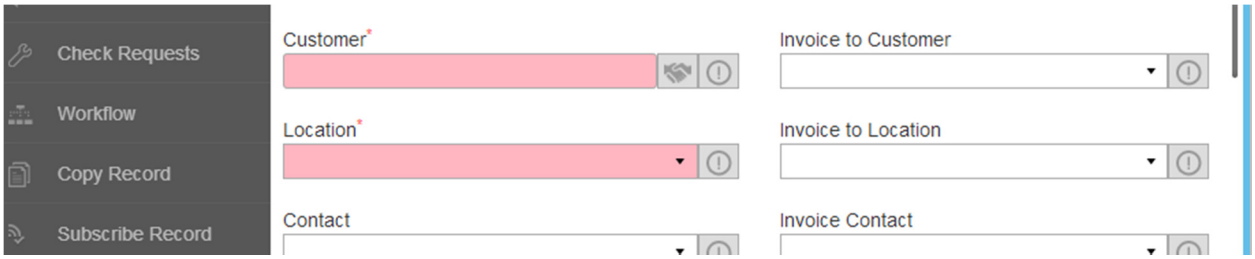
7 FIELDS & LABELS

7.1 FIELDS

Fields refers to presentation of all the columns of a table on tab of a window.

7.1.1 MANDATORY

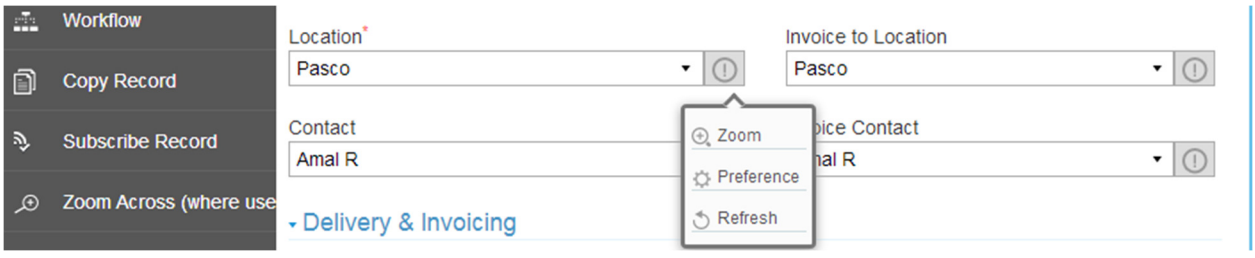
A mandatory field means its value cannot be null. You have to set any value in the mandatory field according to your requirement to save that record in database. A mandatory field is represented by pink color of the field. All the fields with pink color are mandatory fields.



As shown in the above image customer and location are mandatory fields and are represented by pink color.

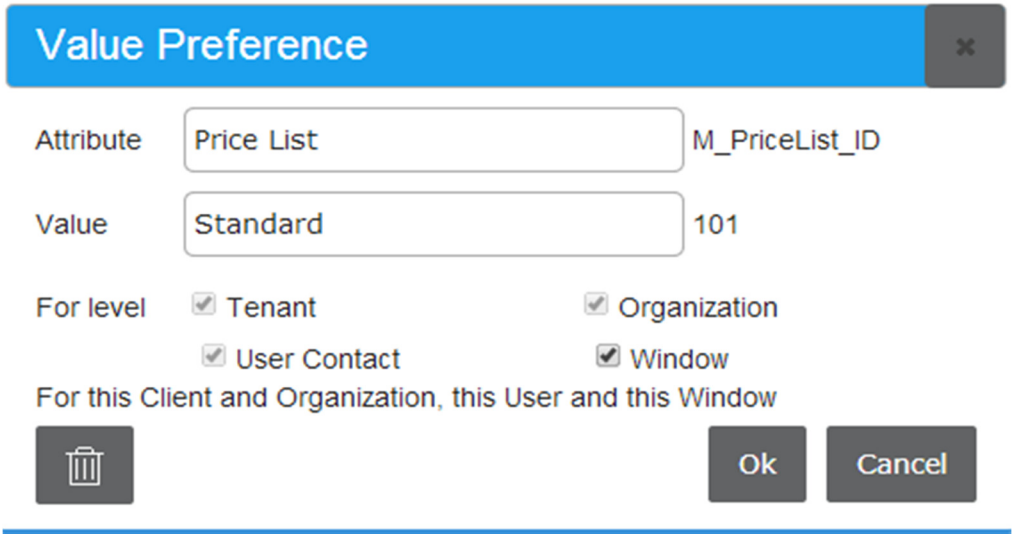
7.1.2 ZOOM

When you click on button at rightmost part of a field, a pop is opened as shown in the image below. When you click zoom option from the popup, you will navigate to that record which is selected in that field from where you have clicked zoom.



7.1.3 PREFERENCE

Preference gives you the information about the value selected in the field. As shown in the image below, it tells you attribute and value of the field.

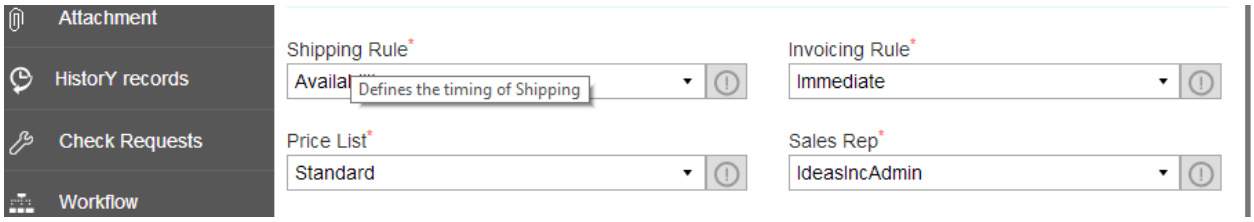


7.1.4 REFRESH

Click the refresh option to refresh all the values in the field.

7.2 LABELS

Label refers to the names given to fields. When you take your mouse pointer to any label, it shows the description of that field or purpose of that field.



When we take mouse pointer to shipping rule label, it describes the purpose of this field as shown in the image above.

INDEX

language, 4

role, 2, 5, 7